

FINANCIAL ADMINISTRATION MEMORANDUM NO. 2001- 012 (II.G.1.)

To: Bureau Assistant Directors, Administration
Director, Office of Acquisition and Property Management
Chief Executive Officer, National Business Center
Bureau Finance Officers
Finance Officer, Financial Management Services

From: Theodore Woronka
Deputy Director, Office of Financial Management

Subject: Conference Planning - Clarification on Internal Meetings

The purpose of this Financial Administration Memorandum (FAM) is to provide additional implementing guidance for recurring internal meetings that involve 30 or more attendees with the majority in a temporary duty travel status. The Departmental Policy for Conferences and Meetings Involving Travel was issued by the Assistant Secretary Policy, Management, and Budget on July 19, 2001, and is included as an attachment to FAM 2001-011. The clarification dealing with recurring internal meetings is provided in question and answer format below:

1. Does the Federal Travel Regulation (FTR) on conferences apply to internal meetings of 30 or more attendees?

Yes, the FTR does apply to internal meetings for Federal employees if there is a requirement for temporary duty travel for the majority of the attendees. The primary objective of the policy and regulation on Conference Travel is to establish a more business-like approach to conference planning -- and not to place excessive burdens on managers.

2. Can internal meetings be exempted from the Conference Planning Requirement?

Yes, in order to simplify the process for recurring internal meetings that happen to fall under the FTR rules, Program Assistant Secretaries may exempt internal meetings from the formal planning process. Please note; however, that any internal meeting exempted may not include authorization of the conference lodging allowance (CLA), and/or the provision of light refreshments.

3. What Types of Meetings Qualify for Exemption from the Conference Planning Requirements?

The Program Assistant Secretary may exempt internal meetings aimed at reviewing operational results or issues. These meetings must meet all of the following criteria for exemption:

- (1) The focus is on internal Departmental matters.
- (2) There are few (if any) outside attendees.
- (3) The requirements for conference-type facilities are minimal.
- (4) The meeting involves 50 or fewer participants in travel status.
- (5) The meeting does not require foreign travel.

Examples of these types of meetings may include overseeing program activities reviewing program results, conducting on-site reviews, determining “lessons learned”, providing technical assistance, developing plans, etc.

4. If an internal meeting has been exempted from the formal Conference Planning Requirement, must the participants still obtain trip-by-trip travel authorizations?

No, travel of this type may be performed under an open or limited open travel authorization, if the bureau normally uses these authorizations.

5. If an internal meeting has been exempted from the formal Conference Planning requirement, may the Conference Lodging Allowance (CLA) be approved and/or may Light Refreshments be provided?

The authority to provide the Conference Lodging Allowance (CLA) and/or Light Refreshments does not extend to internal meetings that have been exempted from the Conference Planning Requirements.

This FAM and all of the related documents on this subject are posted on Interior’s website and linked to the FTR. The website is: <http://www.doi.gov/pfm/travel.html>.

Should you have any questions regarding this matter, please contact Bill Webber on (202) 208-4701.

Prior Financial Administration Memorandums on this subject:

FAM #2001-011 (II.G.1.) dated July 25, 2001 - Active